



Foreign Agricultural Service

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## France

## Processed Sweet Corn

## Annual

## 2002

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### Report Highlights:

As a major exporter and consumer of canned sweet corn, France is both a competitor and a market for U.S. sweet corn. In MY 2001/02, the strong dollar hurt sales in France. The market share for U.S. product declined to 14 percent, while the market shares of Hungary and Thailand rose to 32 percent and 28 percent, respectively. In 2001, the French market for canned sweet corn stabilized, after several years of decline due in part to concerns over biotech product. In MY 2001/02, French exports of canned sweet corn declined, with Hungary taking market share from France in Germany and Russia.

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Paris [FR1], FR

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## Executive Summary

As a major exporter and consumer of canned sweet corn, France is both a competitor and a market for U.S. sweet corn. In MY 2001/02, the strong dollar hurt sales in France. The market share for U.S. product declined to 14 percent, while the market shares of Hungary and Thailand rose to 32 percent and 28 percent, respectively. In 2001, the French market for canned sweet corn stabilized, after several years of decline due in part to concerns over biotech product. In MY 2001/02, French exports of canned sweet corn declined, with Hungary taking market share from France in Germany and Russia.

## Section I: Statistical Tables

### PS&D Table

PSD Table						
Country	France					
Commodity	Canned Sweet Corn				(MT)(Dec. Fraction)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Production Gross WT	243800	243800	243000	269790	0	272000
Production Net WT	146867	146867	146386	162524	0	163855
Conv. Rate Net/Gross	1	1	1	1	0	0

Source: French corn growers

## Trade Matrices

Canned Sweet Corn:

Export Trade Matrix			
Country	France		
Commodity	Canned Sweet Corn		
Time period	July-June	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Germany	33935	Germany	27432
UK	21790	UK	22773
Spain	17550	Spain	21289
Italy	11429	Italy	12489
Russia	8657	Belgium	6335
Belgium	6397	Russia	4995
Sweden	3564	Sweden	4331
Switzerland	2802	Switzerland	3433
Denmark	2090	Denmark	2628
Israel	1482	Israel	1487
Total for Others	109696		107192
Others not Listed	9468		9581
Grand Total	119164		116773

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Canned Sweet Corn		
Time period	July-June	Units:	MT
Imports for:	2000		2001
U.S.	1926	U.S.	1032
Others		Others	
Hungary	1824	Hungary	2407
Thailand	1716	Thailand	2109
Italy	824	Italy	710
Total for Others	4364		5226
Others not Listed	956		1261
Grand Total	7246		7519

## Frozen Sweet Corn:

Export Trade Matrix			
Country	France		
Commodity	Frozen Sweet Corn		
Time period	July-June	Units:	MT
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
UK	9948	Belgium	5323
Belgium	5795	UK	5150
Germany	1258	Germany	1271
Total for Others	17001		11744
Others not Listed	1058		1529
Grand Total	18059		13273

Source: French Customs

Import Trade Matrix			
Country	France		
Commodity	Frozen Sweet Corn		
Time period	July-June	Units:	MT
Imports for:	2000		2001
U.S.	311	U.S.	70
Others		Others	
Spain	1809	Belgium	1475
Belgium	888	Spain	1086
Netherlands	668	Germany	717
Total for Others	3365		3278
Others not Listed	569		868
Grand Total	4245		4216

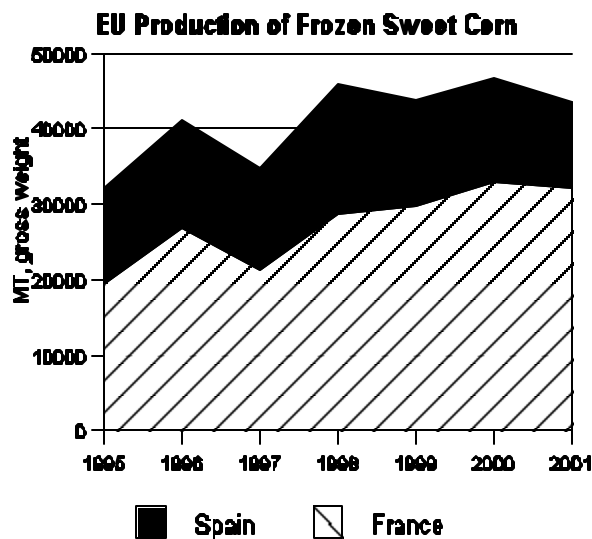
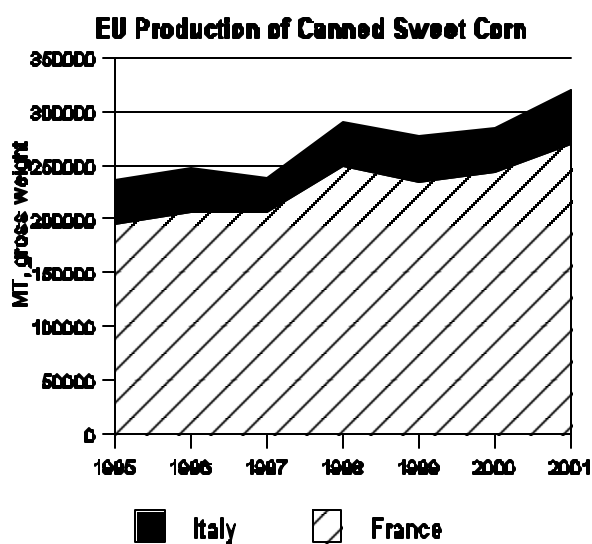
## Tariff Table

Products	Customs Codes	Import Duties
Frozen Sweet Corn	07 10 40 00	5.1 % + 9.4 Euros per 100 Kg
Canned Sweet Corn	20 05 80 00	5.1 % + 9.4 Euros per 100 Kg
	20 01 90 30	5.1 % + 9.4 Euros per 100 Kg

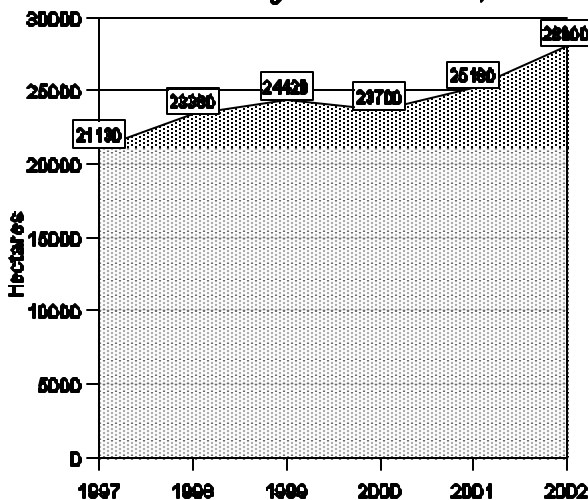
## Section II: Production, Supply and Demand

### Production

France is the leading producer of processed sweet corn in Europe. In 2001, French production accounted for 84 percent of the EU production of canned sweet corn and represented 74 percent of the EU production of frozen sweet corn. The graphs below indicate that France has had this leading position for a number of years.

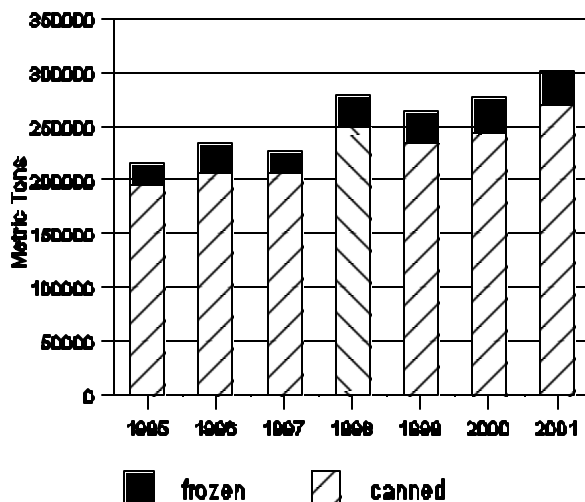


In France, 95 percent of the sweet corn production is located in the southwestern regions, where most of the feed corn is planted. Sweet corn is grown by approximately 1,300 farmers (organized into 10 producer groups) contracting with 9 industrial processing plants, which belong to 6 industrial groups: Bonduelle, Géant Vert (Green Giant), Compagnie Générale Conserves, Ardovries, Conserves France, and Légum'Land Surgelés.

**Sweet Corn Acreage Under Contract, France**

The area planted to sweet corn under contract was 25,180 ha in 2001. The 2002 estimate is 28,000 ha. In 2001, the area planted to sweet corn to be frozen accounted for 11.6 percent of the total sweet corn acreage.

In 2001, the average yield amounted to 19 MT per hectare, down from 19.3 MT/ha in 2000. This decline resulted from irregular climatic conditions in 2001. In addition, the area planted to "super sweet" varieties was higher in 2001. Note: these varieties have more variable yields than other varieties.

**Processed Sweet Corn - French Production**

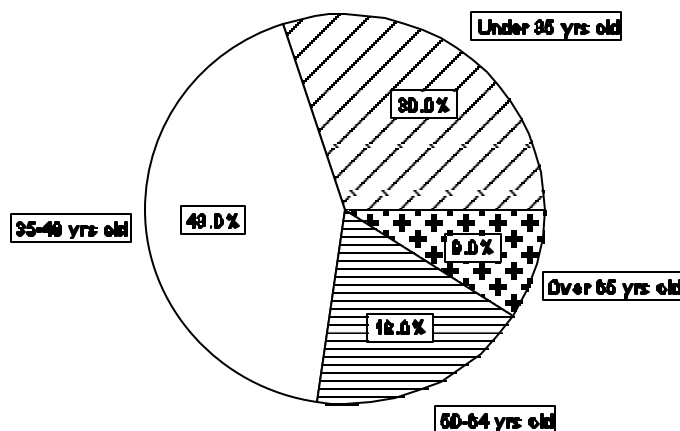
Over the past few years, French canned sweet corn and frozen sweet corn production has increased significantly, triggered by domestic and export demand. A decline was recorded in 1999 because of French concerns for biotech corn. Since then, production has increased. French sweet corn processors are labeling their product non-biotech.

## Consumption

Following a 7 percent decline in 2000, French household consumption of canned sweet corn stabilized in 2001. According to the French consumer survey agency SECODIP, 54 percent of French households purchased canned sweet corn at least once in 2001. On average, these households purchased canned sweet corn four times per year.

In 2001, 73 percent of French consumers purchasing canned sweet corn were under 50 years old, as indicated in the graph below. However, while consumption is stabilizing for people under 35 and declining for people between 35 and 50, consumption increased by 3 percent for people between 50 and 65 years old.

### France - Age of Canned Sweet Corn Consumers



## Trade

France is a net exporter of canned sweet corn, as production is significantly higher than consumption. French and U.S. canned sweet corn compete for European markets. In MY 2001/02, French exports of canned sweet corn were down 2 percent from MY 2000/01. This resulted mainly from reduced shipments to Germany (which is France's leading export market) and Russia. In these markets, the French product competes with Hungarian product which is often cheaper. The area planted to sweet corn in Hungary (roughly 35,000 ha) is higher than in France, and production costs are lower in Hungary than in France. In addition, the pre-accession agreement between the EU and Hungary is expected to reduce tariffs for Hungarian farm products exported into the EU, which will further increase the competitiveness of Hungarian sweet corn on the EU market.

In MY 2001/02, French imports of U.S. canned sweet corn decreased by 46 percent to 1,032 MT. In addition, the market share of the U.S. product declined from 26.5 percent in MY 2000/01 to 13.7 percent in MY 2001/02. This decline in U.S. shipments to France was offset by increased imports from Hungary and Thailand. Their respective market shares were 32 percent and 28 percent. Reduced U.S. exports to France were mainly due to the lower price-competitiveness of the U.S. product versus the Hungarian and Thai products. In MY 2002/03, U.S. exports of canned sweet corn to France are expected to rebound, as the dollar weakens against the Euro. To some degree, U.S. sweet corn sales in France continue to suffer by association with biotechnology.



## Marketing

The main French importers of U.S. sweet corn are the following:

Canned sweet corn: TRIOMPHE/SNAT  
105, rue Paul Vaillant Couturier  
92300 Levallois-Perret  
[monarch@club-internet.fr](mailto:monarch@club-internet.fr)  
Tel: (33-1) 41 27 21 30  
Fax: (33-1) 41 27 21 35

Société Soreau  
52, rue Molière  
94203 Ivry sur Seine  
Tel: (33-1) 46 70 10 66  
Fax: (33-1) 46 70 28 37

Fresh sweet corn: Unicorn Provence  
Campagne Les Aubettes  
84120 Pertuis  
[Unicorn-provence@wanadoo.fr](mailto:Unicorn-provence@wanadoo.fr)  
Tel: (33-4) 42 61 92 26  
Fax: (33-4) 42 61 99 64